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ABSTRACT

The "Planning Wheel" is an evolution of the original Systems Approach Model (SAM) that was introduced in 1986 by Murk and Galbraith. Unlike most current planning models, which are linear in design and concept, the Planning Wheel bridges the gap between linear and nonlinear processes. The "Program Planning Wheel" is designed to give community and economic developers and program planners a hands-on tool to start and stop at any point along a continuum. The Wheel, which combines the macrosystem and microsystem approaches to planning, highlights the following elements as the predominant components of the program planning process: evaluation and follow-up, educational process determinants, needs assessments, instructional planning, administrative and budget development, and program development and implementation. In addition, internal and external influences constantly revolve around the outer part of the Wheel, and each of the Wheel's main components has subdivisions providing key interrelated, independent models. The Planning Wheel's system approach may be used by administrators, instructors, trainers, and others to perform various planning-related tasks, including determining how to accomplish multiple tasks, determining how to keep ahead of the competition, and making the transition from program idea to program reality. (Contains 23 references) (MN)

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The Planning Wheel: Value Added Performance

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The Planning Wheel: Value Added Performance

Abstract

Most current planning models are linear in design and concept. However, in practice contextual demands are not always linear. The Planning Wheel is a promising, new planning model. The Planning Wheel bridges the gap between linear and nonlinear processes and addresses these important forces. This model allows for the interaction and interdependence of six major components of the program planning process. Furthermore, the Planning Wheel provides a macro and micro systems approach. The model incorporates internal and external forces that influence new economic development by capturing political, social, cultural, technological, and economic forces of the marketplace. The Planning Wheel offers promises in application in a variety of environments and circumstances. For example, it is especially valuable for workforce training programs in emerging economies.

Introduction

Planning to empower an organization for maximum effectiveness in the global marketplace is of special importance to companies in transition countries, especially those with emerging economies. Brake et. al (1995) asserted, " We are in an era of global business--a one world market. The traditional orientation of companies working just within national boundaries is declining worldwide" (p.2). According to Venezuelan economist, Guillermo Cardoza (1996), "Economic globalization and the rapid pace of technological change have dramatically altered the context for the intervention of developing countries into the world economy" (p.1). Phillip Kotler (1975) indicated, "The environment is changing too fast for any organization to just coast along each year hoping to do better without engaging in concrete analysis and planning" (p.237).

Adding value and quality to products and services in the global marketplace is a key function of program planning. Planning is another crucial "P" to add to the traditional "four P's": Price, Product, Place and Promotion. The need to design, develop, market, and implement successful product / programs will continue to expand rapidly into the next decade. Effective planning assesses needs and then brings together the humanpower, materials, and capital resources required to meet those needs. Creative planners often go where others fear, creating and developing a marketing niche--they innovate or perish!

During the coming years, the forces of politics, economics, technology, competition, and (organizational) culture will become major influences in developing countries for businesses, economic developers, and their clients. More often, linear and rigid models of planning seem inappropriate for some organizations. Planners have paid attention to either internal or external forces affecting their organizations, but not to both. Analyzing these factors is necessary to meet the competition's demands and to pursue a [lifelong] learning organization.

"A Program Planning Wheel" is a newly developed planning construct, an evolution of the original Systems Approach Model (SAM). The new planning wheel highlights the concepts of evaluation and follow-up as central to all phases of program planning, irrespective of any linear starting point. The Wheel is designed to give developers and program planners the creativity to start and stop at any point along the Wheel, so that the entire planning process becomes a successful experience for all concerned.

"Planning [in management and organizations]," according to Koontz, O'Donnell, and Weihrich (1986) and updated by Weihrich and Koontz (1993), merits an important definition: "Selecting missions and objectives--and the strategies, policies, programs, and procedures for achieving them; decision making; and the selection of a course of action from among alternatives" (p. 717).

According to adult educators, Sork and Caffarella (1989), "Planning refers to the process of determining the end to be pursued and the means employed to achieve them. In adult education, planning is a decision-making process and a set of related activities that produces educational program design specifications for one or more adult learners" (p.233). As these closely allied definitions suggest, the planning process of today--and in the future--is no longer an isolated series of activities but, rather, a complex set of procedures.

Cardoza (1996) added that this transformation from a series of activities to a complex set of procedures demands not only a new institutional set-up [paradigm], but,more importantly, the participation of highly skilled professionals to assure high rates of technical change. As Cardoza

(1996) indicated, "Innovate or perish, is the statement that best defines the present situation" (p.9).

Understanding that the planning process is no longer an isolated series of activities but a complex set of procedures is a first step. Planning is, then, an interactive process, a dialectic among organizers and constituents, much like power negotiations from the board room to the classroom. A major concern of planners, then, according to Cookson (1995) is how theories on program planning might benefit practitioners.

Historical Perspectives

Cervero and Wilson (1994) categorized the various theoretical contributions as:

* classical models
* naturalistic (interpretive) models.
* critical theory models.

Tyler's (1949) instructional planning approach serves as a basis for classical planning models. Most classical models suggest a scientific approach to program planning, usually linear and sequential, and value context free as long as the planners follow the procedures carefully.

Naturalistic (interpretive) models attempt to describe what actually happens. They tend to believe that reality is a changing dynamic that can only be understood through reflection of past experience(s). Adjustments then determine action (Merriam, 1993, p.48).

From practice to theory is the guide for how planners should plan. Problem-solving is the method through which they activate programs or solve problems. The planners usually reflect on the context (Schon, 1983) and act on their best judgments as they find meaning through interpretation of their experiences from the context (Carr & Kemmis, 1986), then incorporate the plan(s) into action. Critical theory models focus on the inequitable balances of power between those who mandate and plan educational and development programs, and those who participate in them.

Most classical and naturalistic planning models comprise the following steps or sequential stages:

1) inputs of a learning needs assessment,

2) process directed to those needs,

3) outcome(s) that represents the learned behavior(s,

4) feedback in the form of an evaluation that proves the information necessary to repeat the programming cycle.

According to Cervero and Wilson (1994), the classical and naturalistic models are incomplete and insufficient: they fail to consider program planning as a "political process" in which planners must negotiate with different sets and concerns of the stakeholders pertinent to any given program. The authors also believed critical theory models emphasize such things as imbalances of power relations within the program (system) but seem weak on realistic applications for practice. Cervero and Wilson (1994) suggested that program planning is a participatory process. Planning empowers stakeholders to discover alternative realities through a give-and-take process of negotiated interests.

Commonalties of Program Planning Literature

Most traditional program-planning models for professional education, economic development, marketing and management are linear in design. An extensive review of the literature (Tyler, 1949; Houle, 1972; Knowles, 1970; Pennington & Green, 1976; Sork & Buskey, 1986; Koontz, O'Donnell & Weihrich 1986; and Weihrich & Koontz, 1993) revealed that most programs generally contain sequential steps in the program planning design process:

1) assess needs,

2) establish program priorities and responsibilities,

3) select program goals and objectives to address suitable themes,

4) allocate available resources,

5) select appropriate teaching and learning techniques (strategies),

6) evaluate results or outcome(s), and

7) determine the program's effectiveness (accountability).

After studying 50 training program models, Sork and Buskey (1986) found the same sequential steps in the planning process. Sork and Buskey asserted there was a lack of cross-referencing of models in the program planning literature for adult and continuing education and an absence of cumulative development of the models.

Boone's (1985) review and analysis confirmed that the models seemed to follow the linear, sequential process of programming. Some models emphasized involvement on the part of the planners at the initial stages; others called for comprehensive involvement throughout the event or program. Nearly all the models included an instructional design process with both an evaluation and accountability requirement.

Kowalski (1988) proposed an integrated planning model composed of eleven steps which addressed some of the major forces impacting program outcomes. Both internal and external forces through an advisory committee represented various constituents and examined the internal and external restraints.

To understand the complex decision making of planning processes, one should study Sork and Caffarella's model (1989) of six basic elements for program planning: "Identify controversial or contentious issues related to each of the major phases or steps of planning and to point out areas in which there remains substantial gaps between what theorists say should be done and what practitioners do" (p. 29). The six steps of the Sork and Caffarella meta-analysis planning model are: 1) analyze planning context and client systems, 2) assess needs, 3) develop program objectives, 4) formulate instructional plan(s), 5) formulate an administrative plan, and 6) design a program evaluation plan. These six steps for program planning serve as a basis for planners to analyze various assumptions about the considerations for planning programs.

Chang (1995) reviewed the most recent program planning models from the literature, including Murk and Galbraith, 1986; Sork and Caffarella, 1989; Bennet and Rockwell 1994;

Caffarella, 1994; and Cookson, 1995. She concluded that "Most program planning theories and models in adult and continuing education suggested that planning is a complex and dynamic interplay of decision making [and negotiations], as opposed to a step-by-step deductive ordering. It is the comprehension of all elements and considerations necessary for achieving a responsible program that contributes to successful outcome(s) for both planners and learners" (p. 29).

A Systems Approach

The Systems Approach Model (SAM) addresses the important components of a successful program planning process. SAM is an integrated nonlinear model developed by Murk and Galbraith in 1986 and expanded by Murk and Wells in 1988.

SAM allows greater flexibility, practicality, and creativity than linear models. "SAM is recommended as a holistic approach to the overall program planning, and the teaching and learning process. As a planner, the model components are used as diagnostic instruments to assess learners' needs, to establish meaningful instructional objectives, to set up and properly administer a realistic budget, to ensue a logical agenda of activities, and to evaluate procedures appropriately" (Murk & Wells, 1988, p.47).

SAM consists of five components that are dynamically interrelated, yet independent. "However, for SAM to be successful, all five components must be used, although not in traditional linear fashion" (Murk & Wells, 1988, p. 45). The five components of SAM are: 1) needs assessment, 2) instructional planning and development, 3) administration and budget development, 3) administration and budget development, 4) program implementation and the monitoring process, and 5) evaluation procedures.

(See Figure 1 Major Components of the Systems Approach Model)

Murk and Galbraith (1986) noted that any of the five special components may be emphasized depending on the special needs of the program planners or constituents, or the focus of the program. Evaluation occurs throughout the entire systems approach planning process. SAM does not constrain planners to conduct programs in a lockstep or linear approach. Planners can implement the components of SAM in the order that makes the most practical sense, depending

on a variety of circumstances **(See Figure 2 Various uses of the Systems Approach Model)**. For example, knowledge from a previous successful program [evaluation] serves as the starting point for a similar, more recent version. In this illustration, the planners reviewed the program planning process from the implementation phase, thereby supporting the nonlinear approach to program planning. Also, developing a realistic budget beforehand might be a very logical and cost effective way for the planners to begin the program planning process. SAM allows the flexibility and creativity to begin at any of the five components -- as long as all five are realized in the process.

Figure 1

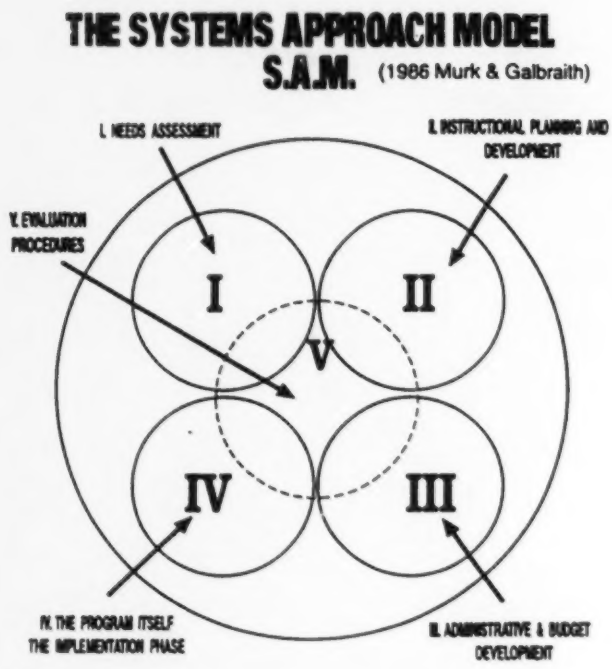
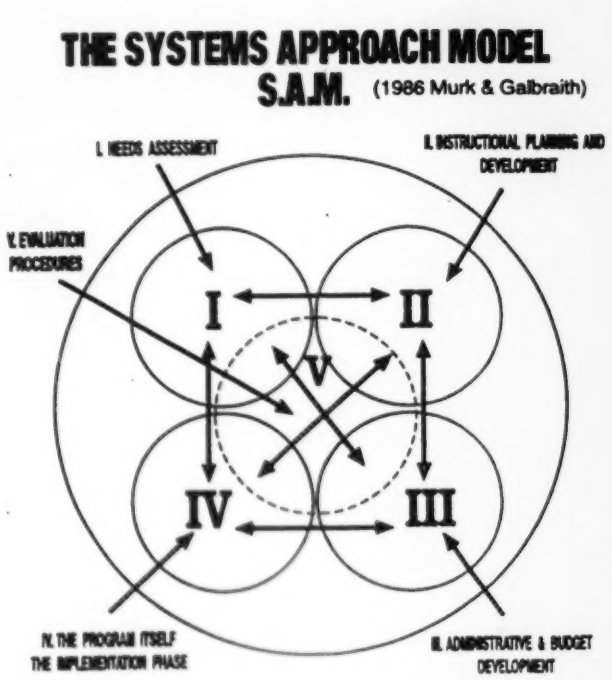


Figure 2



Program Planning the Natural Way

A recent study by Springer (1995), indicated an inherent sequentially that occurs in the planning process for the "final version" of end products: "Final versions of activities (budgets, programs, and so on) cannot be determined until the required predecessor step is completed"

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(pp. 52-53). However, in practice contextual demands may not always be sequential. They could follow one of these probable situations: a supervisor presents a special program to a planner and requests that it be implemented now, or a request is made for a program to be implemented "yesterday" to respond to a competitor's program. Based on these examples, planners cannot implement programs using Springer's model (p.53) without first developing a budget, finishing the instructional planning, and performing a needs assessment.

Further, since a needs assessment is a common first step in a linear designed model (based on the previous review of the literature as well as Springer's analytical comments), a program planner, in theory, would not be able to perform any task [in "final version"] that follows a needs assessment, until completing that step.

Another characteristic of a linear model is its natural tendency to follow a deductive problem solving process, also known as *the scientific method* (that is, identify the problem, propose alternative solutions, evaluate each, choose the best alternative, implement it, and follow up). However, this type of process becomes reactionary; problem solvers identify a problem and attempt to make the problem go away. However, when a program planner is attempting to create instead of solve, the process is more proactionary. Bringing something into being (creating) requires a different cognitive method and process than eliminating or reducing something (problem solving). A systems approach provides a model to assist in this creative process (Murk & Galbraith, 1986).

However, some situations truly indicate a need for a linear sequential planning model. According to Weihrich and Koontz (1993) linear programming is very efficient and actually desired in a production shop where the variables are units of output per machine in a given time, direct-labor costs, or material costs per unit of output. However, denying that inflation rates, import-export regulations, or the organizational environment do not affect the linearity of production is admitting that internal factors (machinery, material, and employees) are the only factors in planning. As Weihrich and Koontz (1993) recommended, linear programming is especially useful

in cases where input data can be quantified and objectives are subject to definite measurement (p. 643).

The Program Planning Wheel

Program Planning Wheel is an evolution of the original SAM model. The "Wheel" (**See Figure 3**) continues the original SAM concept as an integrated, nonlinear approach to program planning. In addition, the Wheel's design gives program planners a hands-on working tool to create and evaluate the components of a successful program. The Wheel also provides a means of explaining the program planning process through a model that closely simulates the actual practice of program planning and, to an extent, economic development.

As a working tool and means of explaining program planning, the Wheel addresses the problems of program planning Sork and Caffarella (1989) identified:

> "Although the practice of planning rarely follows a linear pattern in which decisions related to one step are made before decisions about the next are considered, the process can best be understood in a stepwise fashion whereby the logic of one step preceding or following another step is explained. However, loops operate in practice to make it possible to skip steps temporarily, to work on several tasks simultaneously, and to make decisions that appear to defy logical sequence" (p. 234).

The Planning Wheel provides a model that illustrates these "loops" and can therefore accurately explain the program planning process in something other than a "stepwise fashion."

Sork and Caffarella also indicated, "Although we possess no data to confirm it, we have the impression that the gap that has always existed to some degree between theory and practice has widened since the publication of the last *Handbook of Adult Education* in 1980.

Several possible explanations may account for this widening gap:

* practitioners take shortcuts in planning in order to get the job done
* contextual factors largely determine how planning is done,
* planning theory is increasingly irrelevant to practice" (1989, p. 243).

The Planning Wheel may be one way to close this "gap." It stimulates a creative approach to program planning by enabling the planners to start and stop at any point along the Wheel, thus facilitating successful shortcuts. Planners intuitively approach the planning process based on contextual demands rather than using a linear mandate. These demands might resemble the following two scenarios: 1) a supervisor wants a budget analysis first, or 2) a federal proposal is written for funding and the program will be developed only if funded. Planning in these situations requires an inductive nonlinear model rather than a deductive linear designed model.

(The Planning Wheel as Figure 3 here - See Appendix 3)

Components of the Wheel

The Wheel highlights the predominant components of the program planning process as Evaluation and Follow-up, Educational Process Determinants, Needs Assessments, Instructional Planning, Administrative and Budget Development, and Program Development and Implementation **(See Figure 3)** In addition, internal and external influencers constantly revolve around the outer part of the Wheel and therefore influence the planning process. Each of the main components on the Wheel has subdivisions, providing key interrelated, interdependent modules. Neither the main components nor the subdivisions are numbered to stress the nonsequentiality activities of the Wheel.

The components of Evaluation and Follow-up are the "hub" or "core" of the Wheel, to graphically illustrate that this is a central function to each of the "spokes." Continuous evaluation and follow-up functions are the core to successful program planning. Economic developers and program planners cannot wait to perform these elements at the end of the planning process, as would be depicted in a linear sequential model. The subdivision of the evaluation function includes:

* Addressing and dealing with internal and external influencers
* Designing progressive evaluation instruments and techniques
* Reiterating and reviewing program goals

- Identifying and correcting problem areas and concerns
- Evaluating instructional or production objectives
- Determining instructional or production effectiveness
- Obtaining constructive criticism.

Addressing and dealing with the internal and external influencers are key to the evaluation and follow-up process. The forces or influencers of competition, culture, economy, politics, and technology impact the planning process both internally and externally. The influencers can often direct, facilitate, and cause programs to succeed or fail. The constituents or customers are not listed in this section even though they can and are the ultimate influencers. Because of constituents' direct influence, the Wheel includes the needs of the constituents in the Needs Assessment spoke.

Internally, the influencers are typically interrelated. Competition occurs between individuals and/or departments, each battling over limited resources. One department or group may have more technology, or might be better equipped to utilize the available technology than another, thus influencing the support for their program.

Externally, the influencers can be interrelated as well. However, the competition for funding might be the single most continuous force facing any organization. Politically, programs can gain or lose federal and state funding depending on which political party is in office, or simply if the budget is not cut on programs. Further, organizations can derive an edge when they develop or utilize technology to its fullest. Using computer on-line services, the Internet, and interactive television to develop and deliver programs are some other options to consider.

All of the aforementioned variables impact and influence an organization's climate, as well as the society's culture. As the culture changes, individual attitudes and beliefs change. Perhaps the organizational climate will become different or change over time. When lifelong learning, a social value shared by many, becomes an organizational value, the public's purchasing power may drive the program planning process with their demands.

The Educational Process Determinatives section, not included in the original SAM Model, has been added to the Wheel to identify and determine individual characteristics that the program will serve. This is an important evolution for the model since these characteristics enhance the meaning and identify the purpose of and focus for the program. This section has an important connection in helping the planners to identify conceptually some of the influencers, externally and internally, and to determine how they will be addressed. Other sections of the model will reinforce this process too. This section also enables the evaluation process to measure and follow up on individual outcomes instead of simply reviewing a program as a whole. The Educational Process Determinatives section is subdivided into the following components:

* Understanding, knowledge acquisition, or comprehension
* Learning [what] to do and acquiring new skills
* Improving a skill, and learning by doing
* Practicing a skill, producing a product
* Certifying a skill or talent; and
* Participating in group activity: developing group skills and talents.

The Instructional Planning section focuses on the program purpose component. This section again addresses and deals conceptually with the influencers, internally and externally, by reviewing and reflecting on the overall purpose(s), outcomes, scheduling, and coordination of initiatives and functions. This section is subdivided into the following components:

* Defining program purposes
* Identifying program outcomes;
* Selecting appropriate activities;
* Recruiting effective instructors and resources;
* Scheduling people, time, and facilities; and
* Coordinating facilities and staff.

The Needs Assessment component focuses on the *who and why* elements, subdivided into the following components:

* Determining participant goals and expectations;
* Identifying participant preferences;
* Developing survey instruments and questionnaires;
* Studying community structure;
* Categorizing existing programs; and
* Establishing existing priorities.

Community and organizational review, categorizing existing resources, and establishing new program dynamics address the important influencers, externally and internally, to keep interfacing with the mission and vision of the organization.

The Administrative and Budget Development Section focuses on the Costs *and Financial Support* for the program and subdivides into the following components:

* Formulating a cost-effective budget;
* Determining a fee structure;
* Writing a grant proposal and acquiring external support;
* Corroborating with the organizational mission and structure;
* Coordinating existing resources and programs; and
* Substantiating the priorities as determined.

Planners address and deal with internal and external influences, corroborating with the organizational mission and structure, substantiating the priorities as determined, and coordinating existing resources to avoid duplication and to gain internal support , commitment, and the organization's dedication for the program's success.

A key element often forgotten in the implementation phase is promoting the program. The Program Development and Implementation Section focuses on activating the program and

developing accountability measures. A successful promotional campaign may need more developmental strategies than just advertising. All promotional variables need to be employed.

In addition to advertising (any paid form), the following should be evaluated and considered: publicity (unpaid reports by journalists in newspapers, magazines, on theradio, or television such as public service announcements); sales promotions (discounts for early registrations, discounts for registering or attending with a friend),
personal selling (face to face); and packaging (linking program together, offering self directed learning options, offering the program through a television network or distance learning initiative). This section is subdivided into the following components:

* Producing instructional materials;
* Organizing support staff;
* Creating and launching a promotional campaign;
* Activating the program;
* Monitoring the overall program and accommodating special needs; and
* Offering appropriate recognition and rewards.

The forces or influencers, are addressed through the overall promotional activities and monitoring process during which planners address the special needs of clients, make adjustments in the program and practice accountability measures--all which help programs to be successful.

Applications and Implications

The Program Planning Wheel is a working model that gives program planners and community/economic developers a hands-on tool that provides a systems approach to planning. The Wheel's system approach is adaptable to a variety of multiple settings, serving the various need of administrators, instructors, trainers, and corporate users, as well as the planners. The flexibility, creativity, and practicality of the Wheel also facilitates the planning process. Planners can put the Wheel in motion when facing the following questions: How can we coordinate our work so that we can accomplish multiple tasks? Based on what the competition is doing, how can

we create a program will be a step ahead of them? How can we make the transition from a program idea to a program reality? Our last program was not as good as it might have been; where and how do we start over?

The Program Planning Wheel encourages a creative nonlinear approach to program planning, but it does not preclude a linear approach. But if the planners have a preference for a more linear method such as indicated by Weihrich and Koontz (1993) through an industrial production linear scheduling of products, the Wheel can accommodate this need as well, allowing for sequential access. Depending on the learning style or operations focus of an individual, one method may be better suited to that specific individual's needs. Therefore, the Wheel is both a macro as well as micro systems approach to planning. In addition, the Planning Wheel addresses the internal and external influencers advocate for economic development such as politics, technology, organizational culture, and competition. The Wheel bridges the gap between linear and nonlinear models. It also makes the transition from theory to practice a successful one. Finally, it addresses the contextual realities of organizational expectations, and constituent and societal need as well as the organizational expectations. "So don't wait to begin: Put your hand on the Wheel and start turning!"

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INTERNAL & EXTERNAL INFLUENCERS
CULTURE
COMPETITION
TECHNOLOGY
ECONOMY
POLITICS
EVALUATION AND FOLLOW-UP
Addressing and Dealing with Internal and External Influencers
Designing Progressive Evaluation Instruments & Techniques
Reiterating and Reviewing Program Goals
Identifying and Correcting Problem Areas
Evaluating Instructional Objectives
Determining Instructional Effectiveness
Obtaining Constructive Criticism
INSTRUCTIONAL PHASE
LEARNER ASSESSMENT
INSTRUCTIONAL DESIGN & DEVELOPMENT
PROGRAM DEVELOPMENT & IMPLEMENTATION
• Defining Program Purposes
• Identifying Program Outcomes
• Selecting Appropriate Activities
• Recruiting Effective Instructors and Resources
• Scheduling People, Time & Facilities
• Coordinating Facilities and Staff
• Establishing Existing Priorities
• Categorizing Existing Programs
• Studying Community Structure
• Developing Survey Instruments & Questionnaires
• Identifying Participant Preferences
• Determining Participant Goals and Expectations
• Participating in a Group Activity. Developing Group Skills & Talents
• Certifying a Skill or a Talent
• Practicing a Skill, Producing a Product
• Improving a Skill, Learning by Doing
• Learning to Do and Acquiring New Skills
• Understanding, Knowledge Acquisition or Comprehension
• Obtaining Appropriate Recognition and Rewards
• Maximizing the Program and Accommodating Special Needs
• Achieving the Purpose
• Creating and Launching a Promotional Campaign
• Organizing Support Staff
• Producing Instructional Materials
• Substantiating the Priorities as Determined
• Coordinating Existing Resources and Programs
• Corroborating with the Organizational Mission & Structure
• Writing a Grant Proposal and Acquiring External Support
• Determining an Ample Fee Structure
• Formulating a Cost Effective Budget

The Systems Approach Model (SAM) was introduced in the Fall of 1986, by Dr. Peter Murk and Dr. Michael Galbraith. In 1988, Dr. Peter Murk and Dr. John Wells published a follow up to the SAM model. SAM is an integrated, nonlinear program planning model consisting of interrelated, interdependent components. The Program Planning Wheel was developed by Jeffrey L. Walls, to pictorially transform the evolution of SAM. The Wheel highlights the concepts of evaluation and follow up as central to all phases of program planning, irrespective of any linear starting point. The Program Planning Wheel is designed to give program planners the creativity and freedom to start and stop at any point on the Wheel.

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